

Plan2Fund — User Journey MASTER (V11 Foolproof Blueprint)

1. Global Rules

Navigation (Dynamic NavBar)

- Appears only once user enters Funding (3a) or Plan (3b).
- Dynamic start:
 - Funding entry → NavBar shows: Funding > Plan > Readiness > Preview > Pricing > Checkout > Confirmation
 - Plan entry → NavBar shows: Plan > Readiness > Preview > Pricing > Checkout > Confirmation
- Always visible, sticky.
- Current step highlighted.
- Past steps visible but not clickable.
- Future steps greyed out but visible.
- Progress indicator always shown: "Step X of Y".

Personas (as behavior lens)

- Frustrated persona: wants speed. Defaults auto-filled, minimal input, can skip directly to Preview.
- Newbie persona: needs guidance. Tooltips expanded, educational sidebars, step-by-step flow.

- Expert persona: knows what they want. Advanced fields visible, tooltips hidden, shortcut in Funding "Already know your program?".
- Idea-stage persona: early ideas. Simplified survey in Funding, extra "Did you know?" educational bubbles in Plan blocks.

Inputs

- Each section requires at least one mandatory input.
- Optional inputs may be skipped. If skipped, defaults are auto-filled and flagged in Preview as "Auto-generated, please review".

Uploads

- Each block (Vision, Market, Finance) includes a drag & drop upload zone.
- Supported file types: PDF, DOCX, XLSX.
- Uploaded files listed in Preview, with delete/download options.

State and Persistence

- Persona, survey answers, and drafts auto-saved in local storage.
- Navigation back and forward preserves state.

Layout

- Layout.jsx wraps all routes with NavBar + Footer.
- Footer includes: Terms & Conditions, Privacy Policy, GDPR Info, Contact.
- Footer always accessible.

Trust and Credibility

- MVP stage: placeholder text "Trusted by startups and advisors".

- Compliance badges: GDPR, SSL, Revision Guarantee.
- Testimonials: short placeholder founder quotes shown on Landing and Pricing.

Animations

- Hero: floating background shapes.
- Sections: fade-in on scroll.
- Funding survey questions: slide left/right.
- Program cards: staggered fade-in.
- Plan blocks: expand and collapse smoothly.
- Tooltips: slide-in side panel.
- Buttons and cards: hover lift.
- All animations respect user "reduce motion" settings.

Responsiveness

- NavBar collapses into step indicator on mobile.
 - Grids stack vertically on small screens.
 - Tables scroll horizontally on small screens.
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2. Step-by-Step Journey

Step (1) Choose Path

- Hero + InfoSection explains the product purpose.
- After reading InfoSection, buttons appear:

- "Find Funding" → step (3a).
- "Generate Plan" → step (3b).
- Persona cards shown below buttons: Frustrated, Newbie, Expert, Idea-Stage.
- On choosing, NavBar appears (dynamic start point).

Step (3a) Funding Recommendation Engine

- 3-question survey (Sector, Location, Stage).
- One question visible at a time.
- "Next" disabled until answered, "Back" enabled.
- Progress bar top: "Q1 of 3".
- Results: ProgramCards fade in staggered.
- Each ProgramCard shows: name, description, and "Why we suggest this".
- Clicking a card shows popup with CTA "Continue to Plan Generator".
- Expert shortcut: "Already know your program?" text input.

Educational Component:

- Each question includes a subtext, e.g., "We ask this because funding depends on your location".

Dev Components:

- RecoPage.jsx
- QuestionWizard.jsx
- ProgramCard.jsx

Step (3b) Plan Generator

- Layout: SideNav (chapter navigation) + Main Editor.
- Blocks: Vision, Market, Finance.
- Each block includes:
 - Mandatory and optional inputs.
 - Upload zone.
 - Tooltip icons → slide-in education side panel.
 - "Mark Complete" button.
- Personas:
 - Frustrated → auto-filled defaults.
 - Newbie → tooltips expanded.
 - Expert → advanced toggles open, no tooltips.
 - Idea-Stage → "Did you know?" educational bubbles.

Educational Component (QBank):

- Vision: "What problem do you solve?", "Who is your customer?", "Your vision in 1 sentence?"
- Market: "Market size?", "Who are competitors?"
- Finance: "Revenue model?", "What are your main costs?"

Dev Components:

- PlanPage.jsx
- BlockEditor.jsx
- TooltipSidebar.jsx
- ChapterNav.jsx

Step (4) Funding Readiness

- Advisory only, never blocking.
- Checklist showing completed and missing sections.
- Traffic light indicator: Green = ready, Orange = risky, Red = needs improvement.

Dev Components:

- ReadinessPage.jsx
- Checklist.jsx
- Meter.jsx

Step (5) Preview + Pricing

- Preview displays generated plan like a document viewer.
- Completeness and complexity meters shown.
- Auto-filled fields flagged as "Auto-generated".
- Uploaded files displayed with actions.
- Pricing block below preview with add-ons (Strategy, Review, Coaching).
- CTA: "Continue to Checkout".

Dev Components:

- PreviewPage.jsx
- DocViewer.jsx
- FileList.jsx
- PricingBlock.jsx

Step (6) Pricing

- Pricing cards in Revolut-style design.
- Toggle: Standard vs Priority delivery.
- CTA → Checkout.

Dev Components:

- PricingPage.jsx
- PricingCard.jsx

Step (7) Checkout

- Stripe checkout integration.
- Mandatory email field.
- Optional final document upload.
- Priority toggle.

Dev Components:

- CheckoutPage.jsx
- Stripe integration

Step (8) Confirmation

- Confirmation page on-site.
- Email sent with summary and files.
- CTA: "Request Revision".

Dev Components:

- ConfirmationPage.jsx

- Email service stub

Step (9) After-Sales

- Support form for revisions.
- Optional upsell coaching session.

Dev Components:

- AfterSalesPage.jsx

Step (10) AI Plan Machine (Future)

- Teaser: "Coming soon — AI learns from past plans".
 - Not yet implemented.
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3. Subpages

Terms & Conditions (/legal/terms)

- Placeholder text: General, Liability, Governing Law.
- Example sections for easy editing later.

Privacy Policy (/legal/privacy)

- Placeholder GDPR-compliant policy text.

GDPR Info (/legal/gdpr)

- Placeholder: "Your data is stored securely and can be deleted on request".

Contact Page (/contact)

- Simple form with Name, Email, Message fields.
 - Placeholder company information.
 - Users can always navigate back to the main journey.
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4. Fallbacks & Edge Cases

- Skipped inputs → defaults auto-filled, flagged in Preview.
- No funding results → CTA "Add program manually".
- Plan blocks skipped → defaults auto-filled.
- Readiness step advisory only, never blocking.
- Preview incomplete → warning banner shown.
- Checkout fails → retry and alternative methods.
- Confirmation email fails → web confirmation still shown.
- Uploads fail → retry option.
- Offline mode → save progress locally, sync later.